



Work Instruction (WI)

DIRECTIVE NO. 547-WI-5100.1.4
EFFECTIVE DATE: 05/25/2010
EXPIRATION DATE: 05/25/2015

APPROVED BY Signature: Original signed by
NAME: James Loughlin
TITLE: Branch Head

COMPLIANCE IS MANDATORY

Responsible Office: 547/Manufacturing Engineering Group

Title: Outsourcing for Fabrication Services

PREFACE

P.1 PURPOSE

This instruction outlines the process for the solicitation and contracting of fabrication services from pre-approved BPA or IDIQ vendors.

P.2 APPLICABILITY

This procedure applies only to Code 547 Manufacturing Engineering Group personnel (civil servants and support contractors) who coordinate the procurement of fabrication services from approved BPA and IDIQ vendors.

P.3 REFERENCES

547-WI-4520.2.1: Building 5 East Truck Lock Receiving Procedure
547-WI-5100.1.2A: Blanket Purchase Agreement (BPA) Awarding of Calls
RADIUS Manual

P.4 CANCELLATION

547-PG-5100.1.1C : Outsourcing for Fabrication Services

P.5 TOOLS, EQUIPMENT, AND MATERIALS

None

P.6 SAFETY PRECAUTIONS AND WARNINGS

None

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DIRECTIVE NO. 547-WI-5100.1.X
EFFECTIVE DATE: 05/25/2010
EXPIRATION DATE: 05/25/2015

Page 2 of 10

P.7 TRAINING

None

P.8 RECORDS

Record Title	Record Custodian	Retention
Work Request, 547 WR	Mfr. Eng. Group	Three years.
Vendor's Shipping Document	Mfr. Eng. Group	Three years after final payment.

* *NRRS – NASA Records Retention Schedule (NPR 1441.1)*

P.9 MEASUREMENT/VERIFICATION

None

Instructions

In this document, a requirement is identified by “shall,” a good practice by “should,” permission by “may” or “can,” expectation by “will” and descriptive material by “is.”

The Fabrication Manager shall prepare and solicit bids for in-house, out of house or a combination of both based on the requirements of the request. The Fabrication Mgr. shall follow the proper fabrication work processes for in-house or outsourced vendor. A quotation should be prepared based on the best viable options and presented to the customer. When all requirements are addressed, specifying the work to be performed, and the expected delivery date, a completed and signed work authorization will be provided to the planning office. Once program funding is obtained the quote is committed. (547-PG-5100.1.1)

1. Work Request for the Fabrication Office services

As outlined in 547-PG-8072-1.1 the Fabrication Manager shall obtain a Work Request for services from the customer that will provide a clear and concise description of what the customer is requesting along with any supporting documentation. A review of the Work Request, accompanying engineering drawings and or Electronic Model File (EMF) with its related Critical Dimension Drawing (CDD) and/or any written special instructions will be conducted to determine the overall scope of the work involved. There should be a clear requirement regarding performance expectations (dates, etc). These documents define the agreement between the Advanced Manufacturing Branch and the Project/Customer. Any contradictions between any of these documents shall be resolved with the customer before proceeding.

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DIRECTIVE NO.	<u>547-WI-5100.1.X</u>
EFFECTIVE DATE:	<u>05/25/2010</u>
EXPIRATION DATE:	<u>05/25/2015</u>

2. In RADIUS generate a quote per the manual

RADIUS generates a quotation number for BPA, IDIQ, or FITS. The quotation number from the current electronic data base shall become the shop number on the RFQ/RFO form.

3. In FCPSS generate an RFQ. (Requires Radius quotation number)

Following the step by step instructions in FCPSS:

A RFQ is generated using FCPSS, based on the instructions on the Work Request. Specific requirements of this fabrication i.e. milling, turning, welding, sizes, need dates, etc., shall be entered into the FCPSS. The FCPSS matches vendor capability with fabrication requirements to suggest sources for this task. The RFQ shall explicitly state what work is to be performed by this call: drawing numbers, part numbers, and quantities for each shall be stated. The vendor's responsibilities for notes, hardware or secondary processes and documentation, shall be included along with inspection and quality requirements. Note: For all "In-Scope" hardware, or when specifically requested by the customer, always request a 100% dimensional inspection report, material certifications, secondary process certifications, and the vendor's shop router. As a minimum, unless otherwise replaced by more complete reporting, always request a discrepancy report.

4. FCPSS creates RFQs (PDF button)

5. FCPSS creates a folder in a share file (BPA or IDIQ only)

Submit drawings and or part files to share folder

6. Initiate a routing sheet and submit package to data entry administrator

7. Data Entry Administrator submits the bids to vendors.

A job jacket is created with pertinent information (quote number, customer name, mail code, phone number, drawing number(s), and planner initials) are printed on the outside of the job jacket.

The data entry administrator shall distribute RFQ's to each selected vendor. RFQ packages consist of the RFQ sheet with required delivery, and all drawings or other specification sheets. The drawing copies or PDF's will be distributed as follows: A copy will go out with each RFQ package. A hard copy of the PDF's will be printed and stored in the job jacket.

RFQ packages shall be distributed to each selected vendor by fax, email, courier, or phone call notifying the vendor that the RFQ package is available to be picked up. Unless otherwise specified the vendors are allowed 3 days for package review and are required to fax the RFQ, with fixed price and delivery commitment to the Manufacturing Engineering Group Office.

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DIRECTIVE NO.	<u>547-WI-5100.1.X</u>
EFFECTIVE DATE:	<u>05/25/2010</u>
EXPIRATION DATE:	<u>05/25/2015</u>

The remainder of the job jacket is returned to the Fabrication Manager.

Review of results

8. Data Entry Administrator collects and assembles bids and creates bid preliminary summary

The data entry administrator shall receive all RFQ's from vendors. The RFQ's received after the required bid date shall be marked late and may not be considered for award unless specified by the Fabrication Manager.

The vendor proposed dollar amount, delivery commitment, and any exceptions on the RFQ shall be entered into FCPSS. A preliminary RFQ summary sheet is printed, showing actual RFQ price, and delivery commitment. The RFQ summary and all RFQ's are returned to the Fabrication Manager for review.

9. Planners review summary and quotes to make award recommendation.

If one or more RFQ/RFO's do not conform to, or take exception to, the original requirements, the RFQ's shall be returned directly to the Fabrication Manager. The Fabrication Manager shall determine the proper course of action. One or more of the RFQ/RFO's may be disqualified because of the exceptions, the vendor may be contacted for additional information, or the vendor may be asked to resubmit the RFQ/RFO based upon a different delivery schedule. Fabrication Manager shall include written justification for using a late bid which shall be included in the RFQ/RFO package.

The Fabrication Manager shall review the RFQ/RFO's and RFQ/RFO Summary and make a selection recommendation to the COTR based on best value to the government that meets the project requirement. The Fabrication Manager's recommendation for award is indicated on the preliminary RFQ/RFO package and returned to the Data Entry.

10. Obtain work authorization

Unless previously obtained, when all requirements are defined, a signed work authorization, (Email acceptable) shall be provided, by the customer, to the planning office that specifically authorizes the work to be performed, and the expected delivery.

11. Administrator creates a final summary and submits to COTR

(Commit / recommend for award)

The data entry administrator shall print a final RFQ/RFO Summary sheet based upon the Fabrication Manager's recommendation. The RFQ/RFO Summary shall show each vendor's original price and

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DIRECTIVE NO.	<u>547-WI-5100.1.X</u>
EFFECTIVE DATE:	<u>05/25/2010</u>
EXPIRATION DATE:	<u>05/25/2015</u>

delivery commitment. It will also indicate the vendor recommended for award and the justification if necessary for that recommendation.

The data entry administrator shall assemble the final RFQ/RFO package containing the final summaries and all RFQ/RFO's. RFQ/RFO packages shall be forwarded to the appropriate COTR for processing.

12. COTR Review

A. Disapproved- returned to planner (step 9)

B. Approved- assigns contract information

The COTR shall assign a call number and delivery date to the recommended vendor's RFQ/RFO, signs the RFQ. The COTR shall record the award information on the summary sheet in the specific Vendor file.

13. Verify and obligate funds

A. UNDER 5K the COTR awards and notifies vendor and accounting

BPA contracts shall be awarded I.A.W. the instructions provided by 547-WI-5100.1.2A

The Contracting Officer (CO) has delegated limited COTR authority to certified (civil servants only) within the Manufacturing Engineering Group Office to issue calls to BPA's not exceeding \$5000.

B. Over 5K (BPA and IDIQ)

For BPA calls in excess of \$5000, the COTR signs the RFQ/RFO summary to concur with the Fabrication Manager's recommendation. The COTR shall forward the RFQ/RFO package to the branch resource analyst for funding confirmation.

1. Submitted to requisitioner for PR creation
2. Submitted for PR release
3. Submitted for QA review
4. Pending steps 1-3, submit to CO for review and award

a. IDIQ (only) CO notifies vendor

b. BPA (over 5K) Administrator or COTR notifies vendor

COTR or Contract Specialist prepares the procurement file for CO signature. After the contracting officer assign a delivery date, sign and date the RFQ/RFO, a copy is delivered to the Manufacturing Engineering Group and is faxed or emailed to the winning vendor.

14. Award document returned to administrator for distribution

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DIRECTIVE NO.

547-WI-5100.1.X

Page 6 of 10

EFFECTIVE DATE:

05/25/2010

EXPIRATION DATE:

05/25/2015

A copy of the awarded RFQ/RFO is returned to the data entry administrator for entry of award data into FCPSS. The original signed RFQ/RFO, along with the other RFQ/RFO's and the RFQ/RFO summary are placed in the winning vendor's file.

The data entry administrator distributes copies of the awarded RFQ/RFO package following vendor acceptance of award to the Fabrication Manager and the Accounting Branch.

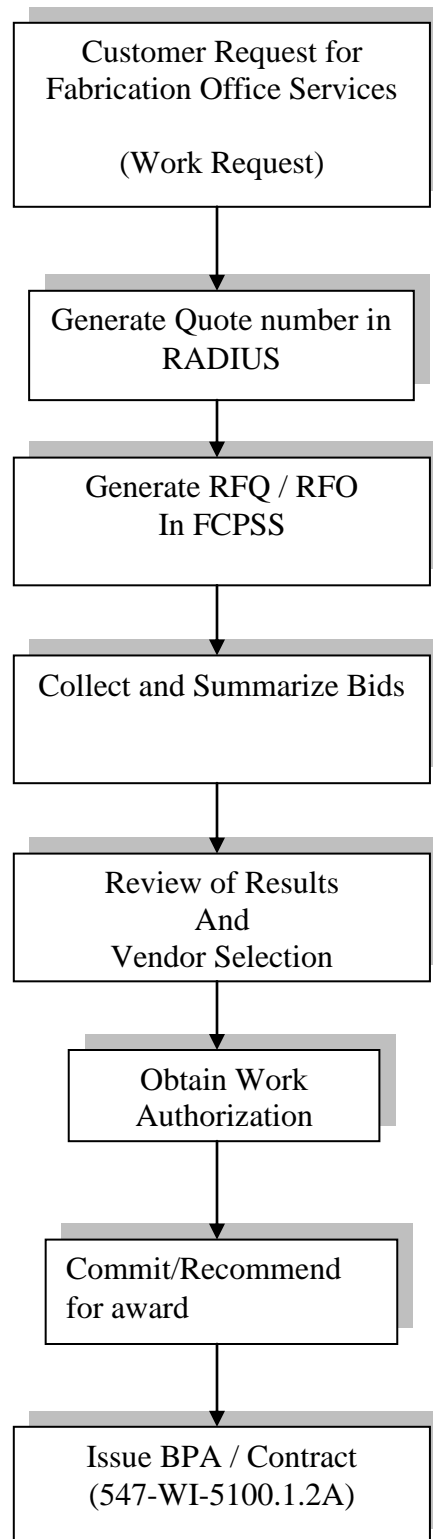
Upon receipt of the award copy, the Fabrication Manager can generate a Cert. Log for receipt of each fabricated part to be delivered from the vendor. Cert. Log preparation can be deferred until hardware is received by receiving personnel in accordance with 547-WI-4520.2.1: Building #5 East Truck Lock Receiving Procedure.

The Cert Log shall be used for receipt of parts per 547-WI-4520.2.1: Building #5 East Truck Lock Receiving Procedure

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Flow Diagram



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EFFECTIVE DATE:	<u>05/25/2010</u>
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Appendix A – Definitions

- a) Data Entry Administrator: Person responsible for distributing RFQ/RFO's and drawing packages to vendors, processing returned RFQ/RFO's using the Fabrication Contractor Performance & Selection System (FCPSS).
- b) Fabrication Contractor Performance & Selection System (FCPSS): An automated database used to select vendors for a particular task based on task requirements and previous opportunities to bid. This system also maintains delivery and quality records for each outside fabrication vendor to aid in vendor selection based on past performance. The printing of several forms used in this process, using database fields, is automated by this system.
- c) Memorandum of Award Verification: Memo certifying that a civil servant recommended the vendor for award.
- d) Qualified Vendor: A list of Vendors performing at an acceptable level as provided by the FCPSS, qualified to provide products or services to GSFC under a contract.
- e) RADIUS: The Research and Development Inventory Utilization System, an electronic database for business and facility management, used to automate fabrication management task, such as Certification Log generation, job tracking and budgeting fabrication assessments.
- f) Request for Offer (RFO): A document detailing specific job requirements used to obtain bids from outside fabrication IDIQ vendors.
- g) Request for Quotation (RFQ): A document detailing specific job requirements used to obtain bids from outside fabrication BPA vendors.
- h) Revision to Call: Used to make official changes to calls placed on existing BPA contracts.
- i) Revision to Call Worksheet (Form 547): Used by Fabrication Manager's to initiate a Revision to Call and to record estimate and disposition of work in progress.
- j) Route Sheet (Form 547 RFQ): Traveler indicating actions to be performed with place holder for signature and date.
- k) Summary of Quotation (SOQ): A form used to summarize multiple RFQ's received for one job, listing all bidders, their prices and delivery commitments.

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EFFECTIVE DATE:	<u>05/25/2010</u>
EXPIRATION DATE:	<u>05/25/2015</u>

Page 9 of 10

Appendix B – Acronyms

- a) BPA: Blanket Purchase Agreement
- b) CO: Contracting Officer
- c) COTR: Contracting Officer Technical Representative
- d) FCPSS: Fabrication Contractor Performance & Selection System
- e) IDIQ: Indefinite Delivery Indefinite Quantity
- f) RFO: Request for Offer
- g) RFQ: Request for Quotation
- h) SOQ: Summary of Quotation

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DIRECTIVE NO. 547-WI-5100.1.X
EFFECTIVE DATE: 05/25/2010
EXPIRATION DATE: 05/25/2015

Page 10 of 10

CHANGE HISTORY LOG

Revision	Effective Date	Description of Changes
Baseline	05/25/2010	Initial Release
A [if this is the baseline version, leave this and the remaining Revision blocks blank]		

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